

"The Power of Experience": the development of the ExperienceBase™ tool for sharing executive experiences



"Storytelling and experience-sharing are profound ways of learning forever."
Jim Dean, ExperienceBase™ creator, UNC

With thanks to Jim Dean, Barb Perkins, Tina Narron, Katie Naftel, Hank Robertson, Chris Hitch, Melissa Hlavac and Melissa Adams of the University North Carolina at Chapel Hill's Kenan-Flagler Business School; Nathaniel Talbott of Terralien Inc.; Donald Hampton, Lisa Reynolds, Martinette Horner and Alisa McLean of the SSNP (Survival School – New Principals) Program.

A. Introduction

This case study describes the design and development of a software tool called ExperienceBase™, the aim of which is to facilitate and enhance the sharing of experience amongst business executives. Innovation exists not only in the end product; this case demonstrates the power of a diverse team to act synergistically, building innovation on top of innovation through the development and implementation process.

B. Overview

UNC Kenan-Flagler provides executive development to a diverse set of organisations, with specialist focus on leadership, strategy and business acumen.

Then Associate Dean for Executive Development, now Senior Associate Dean of Academic Affairs, James W. Dean Jr., recognised tapping into the experience of executives held the key to their ongoing development. Following research, he developed the concept of a software tool to enhance the sharing of experience.

A prototype product was developed and then piloted in collaboration with Dow Chemicals in order to support a two-week leadership high potential program. This program helped Dow and UNC understand more detailed requirements for such a tool, including the design and support needs to ensure its success within a program cohort.

In 2006 a new product called ExperienceBase™ was specified and developed by an external Web company, Terralien, in conjunction with the UNC team. The product was launched in early 2007 and is now in the beta phase of implementation with four groups: Microsoft Europe, UNC alumni, recently appointed School Principals and the U.S. Navy.

C. Product origin and rationale

In 2003 Jim Dean, at that time, at UNC Kenan-Flagler, was having a conversation with the manager at Boeing's Learning Development Center in St. Louis who 'misquoted' research from Morgan McCall, which said that 80% of executive development comes from experience, not from the classroom¹. This idea struck a chord with Jim, as the person responsible for Executive Development, and set him on the track of thinking of better ways to 'leverage the power of experience' (now the executive development slogan).

Four years later, a product has been developed to meet this need. Its sources of inspiration were Jim's examination of educational literature and research through client interviews, combined with the mental agility of Jim and his colleagues to link diverse concepts and apply them to reach a solution.

Interviews with clients highlighted issues of talent management, and the enormous effort of developing high-flyers into senior executives, whilst from a corporate viewpoint, losing much of the learning along the way when learning was not passed on to the 'next generation'. Looking at themselves as individuals, the clients stressed the pressure to focus on day-to-day issues in today's fast-paced world, and the result was a lack of time for reflection and discussion. They often explained that there was an element of social pressure by both colleagues and superiors to be seen as 'working', which acted against reflective learning.

John Dewey's 1897ⁱⁱ experiential learning model acted as a springboard for developing a part of the overall 'leveraging the power of experience' philosophy. The model along with the concept of 'phenomenal learning' from Olson and Ceisel (2006)ⁱⁱⁱ helped the UNC program directors and marketing team formulate a model, called ASPIRE©, which serves as a compliment to ExperienceBase™. When applied in a program setting, the ASPIRE model drives memorable, transformational and unique experiences which are integral to reflection in ExperienceBase™ and experience-based learning.

However, the business and academic worlds were not the only sources of inspiration. Everything from a fashion article in *The Washington Post* to numerous discussions on topics unrelated to learning, combined in Jim Dean's mind to produce the concept of ExperienceBase™ embedded in Executive Development communities.

"I realised it was all part of social networking in the 21st century. We are just down one branch of it, working with education, an extension of MySpace and FaceBook but for the mature executive business world."

Jim admits the development of the ExperienceBase™ concept did not follow a traditional path. "Initially we created a tool, and then wrote a white paper on the thinking behind it. We went from a tool, to a strategy – experience - that went behind it."

The product was developed through 2006 and early 2007 and will move on from its current beta release to more widespread usage in 2008.

D. Theoretical perspectives and key methodologies

"I believe finally, that education must be conceived as a continuing reconstruction of experience; that the process and the goal of education are one and the same thing."

John Dewey (1897)^{iv}

Influences

Experiential learning has roots in the work of John Dewey (1897), and has been built upon by many influential educationalists including Kurt Lewin (1951)^v and David Kolb (1984)^{vi}.

Dewey's theory of experience was founded on two interacting principles - **continuity** and **interaction**. Continuity describes how each individual experience will have an influence on that person's future while interaction sets the experience in a situational context, the interaction between past experience and the current situation. Dewey saw an idea as "the memory of an experience", which needed to be developed and used as the basis for action, then reflected upon to see if the action had a positive impact and was valuable.

McCall, Lombardo and Morrison were the first to emphasise the importance of experiential learning in the Executive Development world in their 1988 book "The Lessons of Experience: How Successful Executives Develop on the Job"^{vii}. The authors interviewed 191 executives from whom they gleaned key developmental events in their lives and the lessons that could be learned from them. They concluded that:

"..stretch assignments and daily interaction with others are far more important to the development of successful executives than the formal training they received," (note need page number) and that ultimately the responsibility for executive development rests with the line manager.

Recently Olson & Ceisel (2006)^{viii} of Accenture described the term '**phenomenal learning**' to demonstrate the transformation of learning in that organisation. The phrase was coined by an HR executive on review of the learning approach at Accenture following the global economic downturn in the early 21st century -

"Whatever else we do, the learning programs we create have to be phenomenal."

The use of the word 'phenomenal' in the title drove Accenture to think beyond information transfer in learning, to focus on the learning experience itself, and on ensuring that it had a major impact on the career and development of the individual. They proposed four dimensions of phenomenal learning - **learning, networking, enculturation** and the **guest experience**. They also developed a definition in order to provide a goal in their design and development work: phenomenal learning means, "creating a surprising and delighting level of excellence in every aspect of the training experience".

It is the thinking by Jim Dean and his organization when you leverage the power of experience, both on-the-job learning experiences coupled with learning from UNC's program content/delivery - including the interface with ExperienceBase™ - you ultimately create unique, transformational and memorable experiences for participants.

Foundations for ExperienceBase™

ExperienceBase™ was developed as a product based on learning theory and satisfying a learning need, rather than a technology tool, although the physical product appeared before the supporting white paper. Dewey's approach formed the core foundation for ExperienceBase™ in Jim Dean's mind - a given situation exists, a person evaluates the options, makes a decision, acts on it, reflects on it and in reflection determines whether they will take the same or different action in the future. But the product was not just a 21st century manifestation of Dewey's process. Its development was a classic example of extensive past experience feeding new ideas and designs. Although not explicit, Jim's years of working in education, building on personal and industry-wide research on androgogy, experiential learning and knowledge management, along with the recent stimulus of ideas such as phenomenal learning from Olson and Ceisel combined to form the concept, key features and approach to designing ExperienceBase™.

Based on the underlying learning theory and his experiences, Jim Dean believed that 'reflection' was the critical success factor; it was the one element that would add value and accelerate learning and development. The challenge was how to incorporate that approach into a tool and into the behaviour of the people using it. It was this element that most strongly informed the design and directed the conversion of theory into practice.

From a learning perspective, asking executives to spend fifteen minutes at the end of each week reflecting on their key experiences may be very effective, but Jim recognised that in reality this is rarely sustainable. Diaries become fully booked, there are frequent interruptions and always another task to complete. In interviews with clients, Jim also discovered the cultural driver of 'being seen to work' - if someone was sitting back reflecting ('doing nothing'), it did not fit with the company work ethic. Also, these thoughts could be lost quickly, not considered deeply enough and not shared widely, without some common knowledge management mechanism. However, executives do spend much of the day working at a computer ('I am looking at my computer therefore I am working' is culturally acceptable). Jim Dean's objective therefore became a solution that portrayed hard work, provided a simple method of capturing and recording experiences and encouraged deeper reflection.

ExperienceBase™ is an electronic experience sharing platform that contains questions which are almost pure Dewey. The reflective element is reinforced by having one area where experiences are recorded, followed by a longer series of questions that probe the actions, impact and learning around that experience. Full details are provided in Section E below.

ASPIRE©

The ideas that were leading to the development of ExperienceBase™ along with the Accenture concept of 'phenomenal learning' stimulated the UNC team to take a step back to consider the wider design of experiential learning, based on a classic foundation of adult learning theory, but customised to UNC and its client base. The result was the ASPIRE© model and associated design process.



Fig 1: ASPIRE© model

The process is initiated by understanding the business and client needs, but then moves to a mapping process, based on the concept that an integrated executive learning experience has six core elements: social, physical, inspirational, rational, emotional and aesthetic. A number of factors, such as the client need, the corporate culture and the prior experience of the participants, will then shape the design of the learning experience. Each client requirement may result in a solution based on a very different emphasis or balance of these elements. Individual approaches to learning (such as 360 feedback and action learning) are linked to each of the six elements, appearing in one or more depending on their suitability to enhance learning in that area. ExperienceBase™, for example, appears against the social, rational and emotional categories. The learning experience is then designed in detail pulling in the right mixture of learning approaches, activities and content in the right balance according to the chosen model.

The inspiration for UNC Kenan-Flagler's approach to executive development and to the development of the ASPIRE model and ExperienceBase™ tool has a wide theoretical and practical foundation.

E. Product description and development process

Product description and features

The ExperienceBase™ product was developed from scratch, with a completely different design and software platform from the initial product used with Dow Chemicals. The developers made use of open source software 'Ruby' (based on a framework called 'Rails') which has a growing community of developers, and which allowed some features to be pulled in from the worldwide development community and modified, whilst others were developed to meet specific needs at UNC.

The product was developed according to the detailed specification provided by the UNC team to Terralien, the software development company, but the development was a team effort, and further enhancements were made as the product went through its iterative development cycle.

ExperienceBase™ consists of two core interlinked elements – the experiences themselves and a discussion forum. There are also areas for registration of participant details and administration of the database. The software was designed so that all recording of experiences and communication is anonymous, allowing those participating to record their experiences, actions and feelings without fear of comeback. However, names can be posted where the individual wishes. To further enhance the open sharing of experiences the tool is intended for use by cohorts of people which have been formed in a deliberate manner, either within an organisation/special interest group or who have been through a leadership development program at UNC.

Experiences

The tool is intuitive to use and simple in its user interface. Following on from registration there is an area to record new experiences.

The screen is structured so that it provides what is believed to be the right balance of free format data entry and guidance. There is an area to enter the experience itself, followed by core questions that provide a more rounded and reflective account of the experience:

- What did you do? What decisions did you make? What actions did you take?
- How did it turn out? What happened as a result?
- What did you learn? What would you do differently? (followed by deeper questioning in this area).

Each question has a section where supplementary questions can be added by the designer of that instance of ExperienceBase™. These questions help the author consider the answer in more detail, and allow for tailoring to given audiences.

- What was the situation you faced? Who was involved? Why was it significant?
- What did you do? What decision did you make and how did you implement it?
- How did it turn out? How did it impact the organization? How did it impact you and the other people involved?
- What did you learn from this? What (if anything) would you do differently in the future?

The screenshot shows a web browser window displaying the 'Experience Base' application. The page title is 'New Experience'. The form includes the following fields and sections:

- Title of Experience:** Text input field containing 'Taking Charge of Change'.
- Division:** Dropdown menu.
- Organization size:** Dropdown menu with 'Between 1000 and 10,000 employees' selected.
- Job level:** Dropdown menu with 'Director' selected.
- Tags:** Text input field containing 'change'. Below it, a note states: 'Tags are used to categorize experiences without the constraints of a rigid hierarchy. You can assign multiple tags to a particular experience (e.g. "hiring", "contractors", "government").'
- Question 1:** 'What was the situation you faced? Who was involved? Why was it significant?'. The answer text reads: 'In July of 2002, the President of the organization that I worked for held an all employee meeting. He announced that the company held in excess of 1.5 billion dollars of insurance on the World Trade Center and in light of the double indemnity clause, was on the hook for 3 billion. As a result, he announced that the parent UK organization had made a decision to close the US organization, a decision that would eventually lead to the lay off of some 2000 plus American employees.'
- Question 2:** 'What did you do? What decision did you make and how did you implement it?'. This field is currently empty.
- Question 3:** 'How did it turn out? How did it impact the organization? How did it impact you and the other people involved?'. This field is currently empty.
- Question 4:** 'What did you learn from this? What (if anything) would you do differently in the future?'. This field is currently empty.
- Buttons:** 'Add an Experience' (green), 'Create' (blue), and 'Cancel' (blue).
- Search:** A search bar with 'Search Experiences' and a 'Find!' button. Below it is an 'Advanced Search' link.
- Popular Tags:** A list of tags including 'advertising', 'associations', 'attorneys', 'building', 'buy-in', 'change', 'checking', 'contracts', 'customer', 'delegation', 'double', 'downsizing', 'government', 'lycra', 'learning', 'management', 'negotiation', 'performance', 'clients', 'amazon', 'issues', 'routing', 'SERVICE', 'SaaS', 'business'.

The screen is designed in such a way that scrolling is minimised. Each question and its supplementary text will only open up for data entry when selected. Additional information such as metadata search tags (keywords) can also be added which help classify the experiences for easier searching in the future.

Experiences can be searched in a number of ways.

- Recent – showing those added in the last (predefined) time period
- Highest rated – there is an Amazon-like rating capability for members of the cohort to rate others' experiences and these experiences are then displayed in rated order.
- Popular – records those individual experiences viewed most often
- Mine – shows personal experiences.



Fig 2: Header showing search options

On the right hand side of the screen in ExperienceBase™ is a visual representation of 'most popular' topics, based on the metatags assigned when each experience was created. Those at the top of the popularity list, containing the greatest number of experiences are shown in the largest font, and there are two other levels of popularity available. This dynamic 'tag cloud' floats slowly, attracting the user's eye and encouraging further exploration of the database. The metatags are not based on pre-assigned terms, but follow the 'wisdom of the crowds' approach to allow the person documenting the experience to nominate the most appropriate words, consciously or unconsciously aided by the tag cloud at the side.



Fig 3: Tag cloud

The search results will display the first few lines of the appropriate experiences in reverse date order and encourage active participation by other readers at this point – to read further or to comment.

Logged in successfully

Recent Experiences

The Art of Project Management

Submitted by: anonymous on August 08, 2007 14:07
Organization: UNC Executive Development Test Site
Tags: project, management, delegation
Rated: (?) ☆☆☆☆☆
Comments: [Post a Comment](#)

Managing a re-branding project for a conservative financial services firm which was very resistant to change. ([Read More...](#))

Unethical Situation in Advertising

Submitted by: anonymous on August 03, 2007 20:09
Organization: UNC Executive Development Test Site
Tags: Unethical, advertising
Rated: (?) ☆☆☆☆☆
Comments: [2 comments](#)

When I was working at a radio station as a sales rep, I came across an unethical situation that occurred between one of our Sales Managers and the largest car dealership in the state (this happened a short while before I started.) The Sales Manager created an advertising schedule/contract for the dealership and in that contract, the dealership was promised a certain number of spots at a discounted total. However, the Sales Manager knew that the owner of the radio station wouldn't approve the contract at such a discount so he altered the contract before he had the owner sign it (the owner had to approve all contracts before they went on air.) Basically, he changed the number of spots. The dealership found out and decided to cancel all advertisements with the radio station. The dealership was the station's #1 client. I was tasked with trying to mend the strained relationship and get the dealership to trust us once again. By the way- the sales rep was fired immediately. ([Read More...](#))

Panic or Not?

Submitted by: anonymous on July 31, 2007 12:45
Organization: UNC Executive Development Test Site
Tags: Trust, delegation, performance
Rated: (?) ☆☆☆☆☆
Comments: [2 comments](#)

While returning from a military installation on a military flight, I heard a completely different engine noise from one side of the aircraft and then silence. The two airmen in the cabin then started moving about and checking several items. The pilot then announced that there was an engine problem, that he had shut down one engine, and that we were making an emergency diversion to a nearby military airfield. As one of 8 civilians on the flight, I started to panic for a moment, then looked at the other military individuals on the flight, who looked quite calm. ([Read More...](#))

Add an Experience

Search Experiences

[Advanced Search](#)

Popular Tags (?)

advertising assumptions
 attorneys buy-in
change checking
 contracts customer
 delegation double
 Downsizing government
 layoffs management
 negotiation performance
 planning program project
 recruiting SERVICE timelines
 Trust Unethical Vendors

[Logout](#)

Fig 4: Browse screen showing three experiences

Discussions

There are a number of ways that individual experiences can link to deeper discussions and further development. In the 'browse experience' option, there is a link to a forum so that a given experience can form the basis of discussion amongst the participants. One of the unexpected developments so far has been the fact that there has been a high level of fellow participants using this linked discussion capability to help an author 'solve' unresolved issues or suggest ways forward based on their own experience, thus providing a natural community of support.

An experience can also be sent via email by its creator to someone outside ExperienceBase™ – a boss, coach or mentor, for example. It is hoped that this feature will help individuals in their own personal development, and also embed ExperienceBase™ in the culture of the organisation.

Discussion does not have to originate from individual experiences and anyone within ExperienceBase™ can start a discussion thread on a given topic area.

The development experience

To an outside audience, in order to keep it simple, Jim Dean describes the innovation as the tool itself, a unique product which is able to promote executive development and learning from experience. Yet the development of this product is also a classic example of the innovation *process* at its best. It supplies key pointers to others who are keen to foster and encourage innovation within business schools.

In our research we have found a number of conditions which are present in innovative business schools and which can be illustrated through the ExperienceBase™ story.

The innovator

Jim Dean is an intelligent, widely-read and thoughtful personality. He is stimulated on a personal level by intellectual questions, and is able to make links between unrelated subjects to solve problems. He knows the executive development business well, and is curious about finding ways to improve it. Like many other innovators he has strong drive and ownership for his ideas. His colleagues comment that,

"Jim is a strategic thinker. He is also great at getting things done. You've got a great combination there."

Research

A chance conversation started the ExperienceBase™ story, but it was followed up by further research with clients and with reflection on the nature of experience-based learning combined with a literature search. Jim also worked closely with a colleague, Tina Narron, to refine and develop the concept.

Although within 'innovative' schools some ideas originated from the client side and others were internal to the school, those that ultimately failed did so because they did not 'fit' a real need. The predecessor of ExperienceBase™ allowed Jim, Tina and the internal IT team to test out their ideas on design, usability, support and approach to capturing experiences. By the time it came to specifying ExperienceBase™ the team had a good idea of what they wanted and what would work.

The partner – Terralien

The UNC Executive Development team created a specification and a Request for Proposal, which was sent out to a number of organisations. Nathaniel Talbott of Terralien nearly rejected the project outright.

"Terralien's focus is on innovative things, more than big enterprise work from large groups. When I see an RFP, I write it off, but Rich the designer felt it was a good fit to our skills, so I listened to his argument, we responded and were selected."

Tina Narron comments, *"We sent out an RFP because we genuinely didn't have predetermined ideas on how it would develop. We picked Terralien precisely because they didn't say 'this is what you asked for so it will take this long to produce'. They asked us questions, made suggestions.....and even Adam, the technical guy, spoke English to me. We felt we could work with them as a team."*

Nathaniel feels that there are core elements that ensured the whole group created a product that went beyond the original specification:

"When I am bringing guys on to my team I look for people who are not just software geeks or design artsy people. I look for those who are interested in the business side, who can think about 'what can I contribute to make this a business success?'"

The UNC team cite a number of areas where 'innovation built on innovation' as Terralien contributed to the design. Terralien took core concepts and found new ways of implementing them, making use of the open source community to discover new solutions, and came up with suggestions of their own – in the search, tag clouds, anonymity features, discussion area and, most importantly, an overall simplification of the design.

"I was really pleased with how willing Tina and Jim were to simplify things. You are always worried when you have a well-defined spec that people won't be willing to adjust and try new things. Instead of 'that is not what we want' we got 'wow, that is a great idea'", says Nathaniel.

In this project, an IT team, an external one at that, managed to work and communicate successfully with a largely non-technical client, to create a product that was a true reflection of the best both groups could offer. Flexibility and open-mindedness contributed to a better solution.

The team – UNC Kenan-Flagler

In a development scenario such as this one, an innovator cannot take an idea from concept to completion all alone. Initially the work involved primarily Jim, Tina and the Terralien team, but by early 2007 other people from the UNC Executive Development group and other support areas began to play a part. System and user testing were completed, the tool was linked into the school's ASPIRE model for Executive Development design, as well as the program offerings and the sales process. A marketing program was developed under Barb Perkins, who had recently joined UNC. She has noticed that,

"The Executive Development team is small, and I found that people all roll up their sleeves here and work on everything if needed."

There appears to be a mutual respect amongst everyone in the team, with a belief in the product and what it can offer. UNC Kenan-Flagler has a strong cultural ethos of making the whole learning experience a positive one for their clients. Perhaps this ingrained behaviour has influenced the relationships within the team and their focus on quality deliverables, even if they are not learning programs.

Active marketing

The team developed a web microsite, a demo of the product and marketing collateral based around 'learning through experience', which were sent out to targeted organisations to raise awareness. As these products and services were developed the UNC team grew in their knowledge and understanding of ExperienceBase™ itself, and each of the players added his or her own expertise and suggestions, so that ownership by mid-2007 was truly shared.

Some of the barriers to the successful implementation of an innovation can often occur at the last hurdle. The effort may go into the development of the product or service, and the owner has a natural belief in its quality and potential for success, but unless that product is marketed both to potential clients and to peers who may have to use and, overtly or covertly, sell it themselves, then it may not gain wide acceptance. The UNC team clearly grasped this need.

Tools support learning and development

Quite often when a new tangible product or tool is developed, the focus is on the tool itself and the mechanics of how to use it. ExperienceBase™ has been designed and developed within a larger context, and is seen as means to develop people, not the solution in of itself. Rich's (the designer) insistence on simplification at every step has resulted in two major advantages for ExperienceBase™. Any tool which involves people and their own lives will have a natural barrier to its use before starting – exposing your own work to scrutiny is not easy. If a tool is difficult to use, especially one aimed at a senior level audience, then it will never work. The fact that ExperienceBase™ is simple in design has also meant the tool can be used in multiple ways, giving it greater flexibility.

The UNC team has a primary use for it, but already some individuals have developed a spontaneous peer support group to help others who have posted a current experience as a dilemma rather than a *fait accompli*. Other organisations have shown an interest in it as a 'living book' documenting best practice. Barb Perkins, having experienced major mergers in her career, has suggested that it may be of use to newly merged teams to post their best ideas on new corporate processes, and to help these teams bond and support each other.

The Clients

*"ExperienceBase™ puts your network within reach. They are only a click away."
Lisa Reynolds, Principal of Roseboro-Salemburg Middle School*

No matter how confident a development team may be, it is only when a product is used in actuality that the power and value of such a tool can be shown. In addition, the clients who go through the pre-production versions of the product need tolerance to understand that it is a work-in-progress and honesty to communicate constructive feedback.

A group from the Survival School for New Principals (SSNP) program (a cohort of 40 people who have recently become school principals) has been using ExperienceBase™ since the summer of 2007 and the participants provided personal feedback for this study. Alisa McLean the Program Director claims that "the concept is fantastic and I hope it takes off as a learning tool for all groups". From her point of view as Director, it is a tool that should provide her with "insight into the needs, wants and thoughts of the program participants," which she may not otherwise be able to obtain outside the classroom.

Lisa Reynolds, Principal of Roseboro-Salemburg Middle School, highlights the ease of use of the tool. "Many web designers fill their web pages with excessive amounts of bells and whistles like floating graphics, complicated menu bars and obnoxious sound effects. The simplicity of ExperienceBase's™ basic web design makes it more user-friendly whilst appearing professional".

The targeting of the audiences chosen to use the product and the applicability of the product to their roles are also key to its success. 100% of the people interviewed said that the ExperienceBase™ content was relevant to their role. Donald Hampton, Principal of Middle Fork Elementary adds “there are many ways to make mistakes in this job and if I can avoid some because of lessons learned by others then I am very grateful”. Ultimately the people using ExperienceBase™ need to feel a strong motivation to be part of a trusting community and to contribute to the knowledge and experience of that community. Here the human factors come in, and consequentially the motivation may vary from one group to another. The UNC team can help increase that belief through good marketing and facilitation, but the personal and ‘corporate’ culture will always play a strong part.

All the clients interviewed from the SSNP program showed concern about confidentiality and how this may restrict the quality of content within ExperienceBase™. Martinette Horner, Principal of Hillsborough Elementary School says, “You never know who is reading and who is connected. I hope everyone abides by the rules of confidentiality, but I don’t trust it yet”. One other contributor says, “I have not entered some accounts because I do not want to be identified. I do not want my superiors to know that I made mistakes...but the best lessons are ones that involve information that could hurt someone professionally or personally. There are great stories that will never be told because people will be afraid that their identity can somehow be ascertained”.

These clients have strong insights into the salient challenges and opportunities ahead for their specific group, which should provide a good basis for the UNC team to move forward.

The environment

Of course there are constraints to innovation, ranging from legal and institutional requirements to budgets. This project was fortunate in that its inventor was in a senior position, able to make strategic decisions on direction and budget allocations, operating only within the constraints of running a profit center. The project scope was also carefully designed to be contained so that it used moderate finance and resources.

Although there have been some examples in our research of ‘lone wolves’ driving an innovative idea through to implementation, in most cases the schools provide an environment which supports creativity. Barb Perkins comments,

“Innovation is part of our life here at UNC; the environment is ‘we can make a difference’, and we know we can’t rest on our laurels, because the world moves on and it doesn’t wait.”

F. Challenges and constraints

- One challenge that came as a surprise to Jim Dean was the **effort required to sell the concept** initially – its purpose, how it worked, and where it added value.

“One thing I underestimated with ExperienceBase™ was explaining it all. I come from academia, not business. The way I think is still too academic, but there again without an academic background I may not have come up with the idea in the first place. Most people do get to the ah-ha moment, but it has taken more time and effort than I expected to explain it, although I guess with hindsight I could have expected it.”

- **Confidentiality and trust** is an ongoing challenge as evidenced by the client feedback. The system is anonymous, but some individuals are still wary of contributing recent experiences in a current job role. Others have said they will put in experiences with a positive outcome, not those that turned out badly. Yet both the UNC team and the clients believe that these experiences are in fact the most valuable. It takes time to develop a community which trusts and supports its members. For the moment the

product is therefore limited to cohorts within a company or within a learning program at UNC, amongst trusted individuals. But there are two sides to the confidentiality argument within smaller communities. Knowing the background of the contributors may enhance understanding and learning, so anonymity may not always be best. The group needs to be very secure and highly trusting for this approach to work. Where individuals are loosely bonded together, possibly not yet secure in their roles and the community is small, then even anonymous postings may not contain the most powerful or most recent learning experiences. As time goes on, the UNC team and clients will be looking to find ways of maximising the experiences of all participants without pressure of negative personal feedback to named individuals. It will be the role of the administrator to drive the commitment and to verify and assure anonymity and confidentiality are very much in place as part of the design.

- As with all knowledge management tools, **maintenance** over time can become an issue, once volume grows to a certain level. ExperienceBase™ is designed to be facilitated and managed by the learning communities themselves, but over time that job may grow in order to maintain a high quality, easily-searched database, with regular, active participation by a majority of the community.

G. Key success factors

In summary from the section above, the critical success factors in this innovation were:

- **A strategic, driven individual with a great idea and strong ownership**
- **Building the right team**
- **Flexibility in design**
- **Internal and external marketing**
- **Supportive clients who can test the product and articulate future development needs**
- **An environment which encourages innovation, experimentation and development of new ideas.**

H. Evidence of impact

Although the product is still new, the impact has been shown at a number of different levels amongst the groups of users. For those who are new in their jobs, like the SSNP participants, it has worked on an emotional support level. Lisa Reynolds comments, "It is comforting to know that others may be going through the same things". Donald Hampton, Principal of Middle Fork Elementary, echoes that sentiment, "It helps me to realise I am not alone in this challenging job," and believes it may have further stress-relieving capabilities: "It could serve as a pressure relief valve as one recounts a story that could only be told anonymously".

So far the impact has been more of a 'reading' experience for many, and as Chris Hitch of UNC says, "you need a critical mass to see the real benefit out of it". Martinette Horner feels she has gained from others' experience, even if she has not yet contributed much herself. "I am a lurker, I like to read what is going on with others," and a number of contributors agree with her.

At a program level, it is important to understand the values on which the learning objectives are based. In the case of two and three-star Navy Admirals, Chris Hitch comments, "we all soon realised it was an effective method to capture collective wisdom that could be passed on to junior officers or back to UNC to enrich the programs. It's especially important as the baby boomer generation retires to develop those who are coming on". Some of the Admirals' entries struck a chord with Jim Dean. There was a consistent message that when you transition into a more senior job you find that people don't tell you the whole story, and there is much to gain from knowing that in advance. "That's the \$100m lesson for me", he notes.

At Microsoft Europe the tool was a vehicle to encourage employees to learn collaboratively without direction and to increase reflection, feedback and coaching internally and it achieved those aims.

I. Into the future

The ExperienceBase™ product is still in its beta form. It is currently offered to all organisations who come on a custom program at the business school and is built into the ASPIRE© model and needs analysis process. However, not all clients will choose to use it. The aim is to start rolling it out to further organisations through 2008 and possibly license it to certain business schools.

The product is robust in its design, having gone through two iterations to reach its current state, but the focus for the future is on features which extend the learning experience, as well as improved administration tools. One area being explored is an Amazon-like feature ("If you like this you might want to see...") to, as Jim Dean comments, "exploit that teachable moment" where associated content (video clips, articles on best practice) support experiences in a given subject area.

As more people use ExperienceBase™ the requirements for future changes will grow. However from feedback it does appear that in this first release the team has certainly achieved a resounding design success in terms of useability. Client feedback for improvements so far include opening it up to a wider audience to gain a richer level of experiences, and provide more time-saving ideas like 'Google alerts' of postings relevant to the user as well as further searching shortcuts.

The greatest challenge will be on the human side, rather than in development of the tool. Barb Perkins and the team at UNC Kenan-Flagler are well aware that there is a growing need for good quality business champions and facilitators to keep the momentum going, the content accessible and to continue to build good-sized active, trusting communities.

The product is actually generic and flexible, and there are already alternative uses being put forward. One idea would be to collate experiences from a knowledgeable group, say the 50 top executives from UNC alumni, to develop a dynamic 'guidebook for leadership' inside ExperienceBase™. Jim says "I am really keen to mine a growing asset of experience for our clients".

There are many ideas bubbling up in Jim Dean's mind, and he sees that, in true collaborative learning fashion, the users of ExperienceBase™ may come up with further adaptations.

"Is this the Model T Ford of the experience world? It could be an early version that develops into something greater with time and with changes in technology. It will probably be different in ways I can't yet see."

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